

11.2 Release Upgrades – User Information

General availability – Noon on Sunday, July 24, 2011

Updates to Supported Browsers/OS

- **Adding Support for** – Windows 7, Firefox 4.0, iPadhardware, and iOS4
- **Removing Support for** – *Effective in 11.3 Release* – Firefox 3.0, Chrome browsers prior to version 8.0, and Safari browsers prior to 4.0

General Enhancements

- **User Profile Accounting Code Favorites** – User can store commonly used accounting code combinations as favorites in their profiles.

Path: *profile>Purchasing>Custom Fields>Code Favorites*

- ❖ *Click on Add to add a FOAPAL to Code Favorites*
- ❖ *Click on Edit to edit a FOAPAL in Code Favorites*
- ❖ *Click on Delete to delete a FOAPAL in Code Favorites*

home/shop | favorites | carts | approvals | history | settlement | **profile** | more >> | AAA | ?

Change Password | Copy Personal Favorites | Add Comment

User Settings | **Purchasing** | Permissions | Supplier Mgt | History

Custom Fields | Purchasing/Approval Limits | Addresses | Product Views | Punch-out Access

Header (ext.) | Codes | **Code Favorites** | Internal Information

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes | ?

Chart 1 | Edit | Delete

Chart	Index Code	Fund	Fund - Banner	Fund Type	Organization	Organization - Banner	Account	Account - Banner	Program	Program - Banner
1 University of Illinois - Urbana	N/A	200250-1 103 Indirect Cost Recovery	200250 103 Indirect Cost Recovery	no value	344000-1 Institutional Review Board	344000 Heat, Light & Power	127010-1 NC Non-Electron Office Eq 500-2499	127010 NC Non-Electron Office Eq 500-2499	344001-1 IRB Expenditures	344001 Ht Lt Pwr Utility Ba

Chart 2 | Edit | Delete

Chart	Index Code	Fund	Fund - Banner	Fund Type	Organization	Organization - Banner	Account	Account - Banner	Program	Program - Banner
2 University of Illinois - Chicago	N/A	301020-2 577 Open Jobs Serv	no value	no value	577000-2 Facilities Management Admin	no value	147700-2 Real Prop Repair/Maint Non-UI Pers	no value	577015-2 Open Jobs Serv	no value

Add

Additional Account Codes | ?

Activity	Activity - Banner	Location	Purchasing Dept	Purchasing Supervisor
no value	no value	no value	no value	no value

11.2 Release Upgrades – User Information

- **View All Document Comments/History on a Single Tab** – User can now select to view all comments or history to see information for all associated documents (requisitions, purchase orders, and invoices).

Example: Comments tab on Invoice 453

home/shop | favorites | carts | approvals | **history** | settlement | profile | more >> | AAA

PO History | Requisition History | my requisitions | my purchase orders | **invoice history** | search exports

Invoice Number **453**
Supplier Invoice No. **1518170A**
Supplier Name **Fisher Scientific Company LLC**

Available Actions **Assign** **Go**

Buyer Invoice | Approvals | Matching | **Comments** | Attachments | History

Add Comment

Show comments for **Invoice**
All
Requisition
Purchase Order
Invoice

Records Found: 0

No comments have been added

Example: History tab on Invoice 453

home/shop | favorites | carts | approvals | **history** | settlement | profile | more >> | AAA

PO History | Requisition History | my requisitions | my purchase orders | **invoice history** | search exports

Invoice Number **453**
Supplier Invoice No. **1518170A**
Supplier Name **Fisher Scientific Company LLC**

Available Actions **Assign** **Go**

Buyer Invoice | Approvals | Matching | Comments | **History** | Attachments

Filters

Start date
End date
Action
Show history for **Invoice**
All
Requisition
Purchase Order
Invoice

Records Found: 8

Export CSV

Results per page: 20

Page 1 of 1

- **View Future Requisition Number for a Cart** – A future requisition number is now assigned to a cart. User can search for draft carts by this future requisition number.

Example: My Drafts

My Drafts							legend ?
Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	597407	Test Cart	6/28/2011		1.00 USD	Delete	

Example: Quick Search

○ Search for Requisition No. **Go**

11.2 Release Upgrades – User Information

- “Prepared By” User Ordering
 - User can retain access to PR/PO where s/he is the “Prepared By” user.

Example: My Submitted Orders

home/shop | favorites | carts | approvals | **history** | settlement | profile | more >>

PO History | **Requisition History** | my requisitions | my purchase orders | invoice history | search exports

Select Query

by PO No. | **by Requisition**

If you are searching for a specific purchase document, include as many of the items below to narrow your results.

Requisition Name

Requisition No.

Supplier Name **Select Supplier**

Catalog No. (SKU)

Filter ☒

Check Filter if you want to use the filters below.

Results per page 10

Search **Request Export**

Filters

To find your purchase documents quickly and easily, choose a date range to search for purchase documents placed during a specified time frame.

My Orders ☐ My Submitted Orders ☒ Department Orders ☐ Orders I Reviewed ☐

Start Date 07/01/2011 (mm/dd/yyyy)

End Date 07/15/2011 (mm/dd/yyyy)

Prepared for **Select User**

Prepared by **Select User**

Approved By **Select User**

Example: Search Results

Requisition(s) meeting the search criteria: 15						
Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition To
✓	601381	Fisher Scientific Company LLC	2011-07-08 Iquick 02	Quick, Lauri	7/8/2011 5:00 PM	153.1
✓	601366	Fisher Scientific Company LLC	2011-07-08 Iquick 01	Quick, Lauri	7/8/2011 4:59 PM	306.2
✗	599012	OfficeMax Incorporated	5-digit asset test	Quick, Lauri	7/1/2011 12:03 PM	1.0
✓	597407	Beckett & Webber PC	Test Cart	Roemer, Barb	6/30/2011 2:21 PM	1.0
✓	596982	Promega Corporation	2011-06-28 Iquick 01	Quick, Lauri	6/28/2011 10:36 AM	2,542.2

Results per page 10 Page 2 of 2

- User can receive email notifications on an order where s/he the “Prepared By” user.

Example: Default email preferences

Shopping, Carts & Requisitions		
Prepared By - Cart Assigned Notice	✗	<input type="checkbox"/>
Prepared By - PR line item(s) rejected	✓	<input type="checkbox"/>
Prepared By - PR rejected/returned	✓	<input type="checkbox"/>

11.2 Release Upgrades – User Information

Purchase Orders			
Prepared By - PO Workflow complete	✓		<input type="checkbox"/>
Prepared By - PO sent to supplier	✓		<input type="checkbox"/>
Prepared By - PO line item(s) rejected	✓		<input type="checkbox"/>
Prepared By - PO rejected	✓		<input type="checkbox"/>

- Preparing a requisition for another user will default the profile values of the “Prepared For” user.

Example – Requisition showing “prepared for” user default information

Requisition	Req Approvals	PO Preview	Comments	Attachments	History																																		
Summary	General	Shipping	Billing	Accounting Codes	Supplier Info	Taxes/S&H																																	
Hide header																																							
General <div> Cart Name: Test Cart edit Description: no value Priority: Normal Prepared by: Lauri Quick Ordered on Behalf of: Barb Roemer Dept Account Coder: </div>		Shipping <div> Ship To edit Department: 1-100 (Control - OBFS Cash Mgmt & Invest) Phone: +217 (333) 8201 Attn: roemer@uiuc.edu Location: TEST ORDER- DO NOT SHIP Materials Research Lab 2007 MRL MC 230 104 S Goodwin Ave Urbana, IL 61801 United States Delivery Options edit Expedite: Ship Via: Best Carrier-Best Way Reg Delivery: no value </div>		Billing <div> Bill To University of Illinois Invoice Processing Center P.O. Box 820 Rantoul, IL 61866 United States Credit Card Info No credit card has been assigned. Billing Options Accounting Date: no value </div>																																			
<div> Barb's default ship to address and default FOAPAL appear on the requisition </div>																																							
View/edit by line item...																																							
Accounting Codes <table border="1"> <thead> <tr> <th>Chart</th> <th>Index Code</th> <th>Fund</th> <th>Fund - Banner</th> <th>Fund Type</th> <th>Organization</th> <th>Organization - Banner</th> <th>Account</th> <th>Account - Banner</th> <th>Program</th> <th>Program - Banner</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>N/A</td> <td>301020-2</td> <td>301020</td> <td>no value</td> <td>577000-2</td> <td>577000</td> <td>147700-2</td> <td>147700</td> <td>577015-2</td> <td>577015</td> </tr> <tr> <td>University of Illinois - Chicago</td> <td></td> <td>577 Open Jobs Serv</td> <td>204 BIS Operating 30</td> <td></td> <td>Facilities Management Admin</td> <td>Facilities Management Admin</td> <td>Real Prop Repair/Maint Non-UI Pers</td> <td>Real Prop Repair/Maint Non-UI Pers</td> <td>Open Jobs Serv</td> <td>Department Staff Development</td> </tr> </tbody> </table>							Chart	Index Code	Fund	Fund - Banner	Fund Type	Organization	Organization - Banner	Account	Account - Banner	Program	Program - Banner	2	N/A	301020-2	301020	no value	577000-2	577000	147700-2	147700	577015-2	577015	University of Illinois - Chicago		577 Open Jobs Serv	204 BIS Operating 30		Facilities Management Admin	Facilities Management Admin	Real Prop Repair/Maint Non-UI Pers	Real Prop Repair/Maint Non-UI Pers	Open Jobs Serv	Department Staff Development
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View/edit by line item...																																							

11.2 Release Upgrades – User Information

- **Copy Addresses from the Header to All Lines** – User can copy shipping address to each line in order to reset all shipping addresses to header shipping address. *Note: Only appears if shipping addresses differ between line items.*

Example – Copy to Other Lines

Shipping ?

Ship To [edit](#)

Department: 1-344
Phone: +217 (333) 2637
Attn: Lauri Quick
Location: Test Order - DO NOT FILL
OBFS UIUC Purchasing
212 Tech Plaza MC 364
616 E Green St
Champaign, IL 618205752
United States
[copy to other lines](#) ←
Ship To values vary by line

Delivery Options [edit](#)

Expedite x

Ship Via

Best Carrier-Best Way
⚠ Ship Via for the following suppliers is unsupported and will not be sent: Hewlett-Packard Company(HP)

Req Delivery

no value
⚠ Requested Delivery Date for the following suppliers is unsupported will not be sent: Hewlett-Packard Company(HP)

[View/edit by line item...](#)

- **Approval Enhancements (For Approvers Only)**
 - **Detailed email notification** – More requisition details are viewable on the email notification. This enhancement replaces the current basic approval notification. *Note: User can set preferred email format (HTML or Plain Text) in User Profile under Personal Settings.*

11.2 Release Upgrades – User Information

Example – New email notification:

Approval Request for Requisition# 603538

Dear Lauri Quick,

The requisition listed below has been submitted for your approval.

Summary

Folder:	4-626 between 10000 and 49999.99"
Prepared by:	Jill Menezes
Cart Name:	2011-07-13 jmene1 01
Requisition No.:	603538
Priority:	Normal
No. of line items:	1

TOTAL: 15,000.00 USD

Details

Home Depot USA Incorporated

Carpet & Drapes

Form Type: Facilities

Item 1

Description:	carpet for Housing units
Catalog Number:	1234567
Quantity:	1
Unit Price:	15,000.00 USD
Ext. Price:	15,000.00 USD
Size/Packaging:	1/EA
Commodity Code:	36010

FORM TOTAL: 15,000.00 USD

TOTAL: 15,000.00 USD

11.2 Release Upgrades – User Information

- **Email Approvals** – Approvers can approve, reject or return a requisition directly from an email notification. *Note: Edits cannot be performed via email.*

- *Click on Take Action (located within body of email notification)*

Accounting Codes	
Chart:	4 - University of Illinois -Springfield
Index Code:	N/A - N/A
Fund:	301035
Fund - Banner:	301035 - 491 Student Newspaper
Fund Type:	
Organization:	626000
Organization - Banner:	626000 - Center for Advanced Study
Banner:	
Account:	146400
Account - Banner:	146400 - Photographic/Microfilm Services
Program:	626007
Program - Banner:	626007 - Student Newspaper

Additional Account Codes

Activity:

Activity - Banner:

Location:

Purchasing Dept: Purchasing UIS

Purchasing Supervisor: Purchasing UIS

Ready to approve, reject or assign this document to yourself? **Take Action** ←

- *Select an action and enter your approval code. Note: Approver must set up approval code in User Profile under User Identification.*

University of Illinois	
Requisition	603538
Status	Pending
Shopper	Jill Menezes
Approver	Lauri Quick

Select an action: ←

☐ Approve

☒ Assign to myself

☐ Reject

☐ Return to Requisitioner

Comment (Optional):

Testing email approval - Assign to myself

Enter your approval code to submit:

....| **Submit** ←

11.2 Release Upgrades – User Information

- Approver should receive a successful response.

Assign to myself successful	
Requisition	603538
Shopper	Jill Menezes
Approver	Lauri Quick
Comment (Optional): Testing email approval - Assign to myself	

- **Filter Approval Queues by Custom Fields** – Approvers can view requisitions, purchase order and/or invoices that contain a certain FOAPAL element (fund, account, etc.)

Path: approvals>requisition

- Click to filter requisitions
- Choose Manual Filter
- Choose filters
- Click on Search

The screenshot shows the 'My Approvals' section of a web application. The top navigation bar includes links for home/shop, favorites, carts, approvals (active), history, settlement, profile, and a 'more >>' dropdown. Below the navigation bar, there are tabs for requisition, invoice, requisition outbox, and invoice outbox. The main heading is 'My Approvals', with a 'Select another approver' dropdown set to 'My Approvals' and a 'Go' button. A 'Filters' dialog box is open, showing various filter options: Filter (Manual Filter), Date (Older Than), Priority (All), Status (All), Show Notifications (checked), and Show Empty Folders (unchecked). There is also a 'Custom Field Filter' section with an 'Account' field and two options: 'Select from profile values...' and 'Select from all values...'. A 'Search' button is at the bottom of the dialog.

11.2 Release Upgrades – User Information

Example – Search Results:

The screenshot displays the 'My Approvals' section of a web application. At the top, there is a navigation bar with links: home/shop, favorites, carts, approvals (active), history, settlement, profile, and a 'more >>' dropdown. Below this is a sub-navigation bar with links: requisition (active), invoice, requisition outbox, and invoice outbox. The main heading is 'My Approvals'. To the right of the heading is a 'Select another approver' dropdown set to 'My Approvals' and a 'Go' button. Below the heading, there is a filter bar showing 'Manual Filter + Priority: All + Status: All + Account: 124000 - Laboratory/Scientific Supplies'. A red arrow points to this filter bar. Below the filter bar is a button '+ Click to filter requisitions'. Underneath, there is a link 'Hide requisition details' and a link 'Assign Substitute'. To the right of these links is an 'Apply Action to Selected Req(s)' dropdown set to 'Approve/Complete' and a 'Go' button. Below this is a table header section with a minus sign and the text 'My Req Approvals'. The table has columns: Requisition No., Status, Priority, Req Date/Time, Requisitioner, Amount, Action, and Select. Above the table, it says 'Results per page 40' and 'Requisitions Found: 0'. The table body is empty, showing '0 of 0' results.

home/shop | favorites | carts | **approvals** | history | settlement | profile | more >>

requisition | invoice | requisition outbox | invoice outbox

My Approvals Select another approver: My Approvals Go

Manual Filter + Priority: All + Status: All + Account: 124000 - Laboratory/Scientific Supplies

+ Click to filter requisitions

Hide requisition details

Assign Substitute Apply Action to Selected Req(s): Approve/Complete Go

- My Req Approvals

Results per page 40 Requisitions Found: 0 Page 0 of 0

Requisition No.	Status	Priority	Req Date/Time	Requisitioner	Amount	Action	Select
-----------------	--------	----------	---------------	---------------	--------	--------	--------

Note: Manual Filter is displayed along with search results.